

HINDSIGHT—INSIGHT— FORESIGHT:

**Highlights from 15 years of
Media and Audience Research**

**Presentation to
The Broadcasting Board of Governors
19 November 2010**



Headlines from the Past 15 Years in 15 Minutes

- **Changes**
- **Constants**
- **Successes**
- **Looking forward**
- **Research contribution to future success**

Changes Global Media Markets

	1995	2010
Competition	Domestic media highly regulated and often of poor quality and limited variety	Domestic media less regulated and often engaging, varied and reflect local preferences
Audience Behavior	<ul style="list-style-type: none"> •Audiences often patient and forgiving of poor audibility •One-way communication and “appointment” listening and viewing 	<ul style="list-style-type: none"> •Audiences often fickle, fragmented, busy and increasingly demanding •Multi-directional communication and migration to new media
Media Locality	Broadcasts mainly within the nation	Broadcasts increasingly transnational via satellite radio and TV
Measured Reach	~ 100 million weekly	~ 170 million weekly
Major Audiences	Former Soviet Union, Eastern Europe	MENA, South Asia, Africa
Principal Delivery Platforms	Short and medium-wave radio	FM radio and TV, with growing emphasis on digital media
Brand Recognition	Authoritative “outside” voices and perspectives	One of many valued sources and perspectives

Changes BBG services

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Constants

Behavior

News-seekers

Consult multiple sources – ‘patchwork news’

Assume all news have a bias or point of view

Group international news sources together

Young people more fickle than older audiences and are early adopters

Preferences

**Content is key
Technology secondary**

Relevance

Engagement and emotional connection

Presentation - talent, appeal and integrity

Trusted word-of-mouth

Successes

		Nigeria	Afghanistan	Iran	Iraq	Indonesia	Burma
Diverse Media Markets	Radio dominates						
	Competitive media environment						
	State-controlled media; jamming						
	Population with high illiteracy rates						

Adaptive Strategy for Success	Strong BRAND Recognition
	Relevant, engaging, targeted CONTENT

Looking Forward

Essential Ingredients for Success

Targeted content and delivery is key:

- **Maximize opportunity for contact**
- **Highly relevant and layered content**
- **Engaged audiences**
- **Multiplier and network effects**

Research Contribution to Future Success

Implementation of Research

Build on existing measures of impact and success and develop tools to measure them

Set path, trajectory and destination before launch

Ask good questions: research as a planning tool, not a report card

Use of Research

Make research inputs a part of decision-making at all levels

Now is the time to listen, learn best practice and adapt

Design creative, innovative research strategies based on needs and priorities

Synthesize multiple research inputs – both existing and new

As the Duke of Wellington May Have Said to Us Today

“All the business of war, and indeed all the business of life, is to endeavor to find out what you don't know by what you do; that's what I called 'guess what was at the other side of the hill'.”

The Duke of Wellington